Quick Reference Guide

Outlook 2010 for Windows: Outside the Mailbox – Outlook Data Management

There are ramifications for having a “Large” Outlook mailbox and/or “Large” Outlook main folders. You may experience slow response time when opening Outlook, performance issues such as slow sorting or searching, and the inability to send e-mail if the mailbox size quota is reached. The larger the number of items in a folder (Inbox, Sent Items, Deleted Items, Calendar, etc.), the greater chance Outlook will send multiple requests to the server if the view is changed or the messages are scrolled through.

Mailbox Size and Maximum Number of Folder Items Quotas

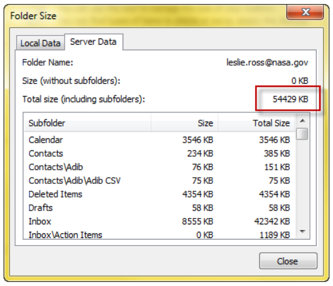
When discussing the size of a user’s Outlook mailbox, we are referring to the folders on the Exchange Outlook Server in your user account, not files stored on your local computer or in a personal storage file.

Mailbox Size: 1 GB Quota

- If the mailbox size reaches **990MB,** the user will receive notifications the mailbox byte count needs to be decreased.
- If the mailbox size reaches **1 GB**, the user can still receive e-mail messages but cannot send e-mail messages.

Check Size of Mailbox

1. Click **File** | **Info** | **Cleanup Tools** | **Mailbox Cleanup**.
2. Select **View Mailbox Size** | **Server Data** tab. The Total size of your mailbox displays as indicated.



Folder Name: leslie.ross@nasa.gov

Size (without subfolders): 0 KB

Total size (including subfolders): 54429 KB

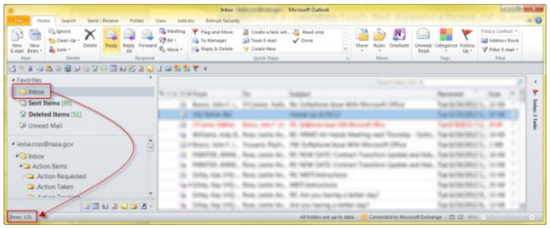
Subfolder	Size	Total Size
Calendar	3546 KB	3546 KB
Contacts	234 KB	385 KB
Contacts\Adib	76 KB	151 KB
Contacts\Adib\Adib CSV	75 KB	75 KB
Deleted Items	4354 KB	4354 KB
Drafts	58 KB	58 KB
Inbox	8555 KB	42342 KB
Inbox\Action Items	0 KB	1189 KB

Folder Items: 10,000 Items Quota

- When a main folder reaches the maximum, user will receive automatic notifications from the Outlook server that a folder contains too many items in it.
- The maximum of **10,000 items** includes all of the main folders with all their subfolders and contents. The maximum number of items in any of the main Outlook folders should be below **5,000** items. Ideally, the number should be around **3,500** items or less for optimum performance

Check Number of Items in a Folder

1. Highlight the folder in the Outlook Navigation Pane (shown below).
2. The Number of items displays at the bottom.



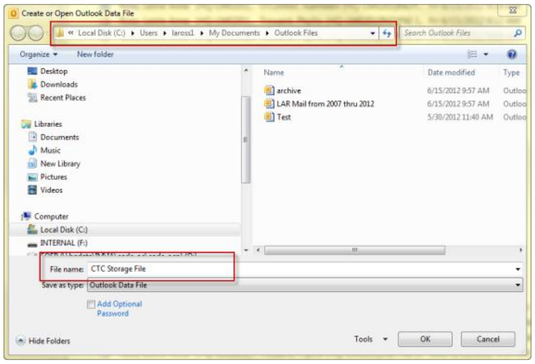
Create Personal Storage Files (.PSTs)

A **.pst** file can be created with unique folders and subfolders to your preferences. There are differences between an **Archive** and a **.pst** file. An Archive exactly mirrors the mailbox, has all the same folders, and the AutoArchive processing, when enabled, automatically moves messages based on the AutoArchive settings. A **.pst** file, on the other hand, is manually maintained by the user, is more flexible in design and can be customized to user preferences.

Very large .pst files can become corrupt. Using multiple .pst files for unique projects or by year is recommended.

1. Click **Home** | **New Items** | **More Items** | **Outlook Data File**. The **Create or Open Outlook Data File** window displays (shown right).
2. In the **File name** field, type the **.pst** file name and then click **OK**. The new **.pst** file appears in the Outlook Navigation Pane.

Personal Folders are not accessible through Webmail (OWA).



Local Disk (C:) ▸ Users ▸ laross1 ▸ My Documents ▸ Outlook Files

Name	Date modified	Type
archive	6/15/2012 9:57 AM	Outloo
LAR Mail from 2007 thru 2012	6/15/2012 9:57 AM	Outloo
Test	5/30/2012 11:40 AM	Outloo

File name: CTC Storage File

Save as type: Outlook Data File

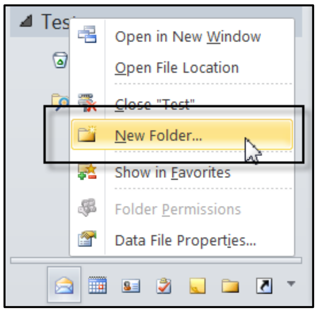
ITCD
Information Technology & Communications Division

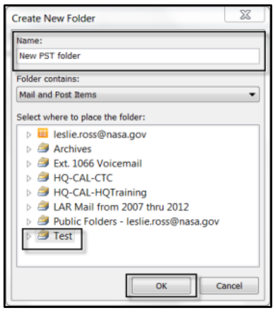
For software training, contact the Computer Training Center (CTC) at 358-1111 or visit the CTC Web site at http://itcd.hq.nasa.gov/ctc.

This document is posted on the ITCD Web site http://itcd.hq.nasa.gov/ctc.

Create .PST File Subfolders

1. In the Outlook Navigation pane, right-click on the **.pst** file and click **New Folder** (shown near right). The **Create New Folder** dialog box displays (shown far right).
2. In the **Name** field, type a name for the new **.pst** subfolder.
3. In the **Select where to place the folder** list, ensure the new **.pst** file is selected and click **OK**. The new folder will be created and visible in the Outlook Navigation pane.
4. Click the **triangle** in front of the **.pst** file to display the subfolder.


Test
Open in New Window
Open File Location
Close "Test"
New Folder...
Show in Favorites
Folder Permissions
Data File Properties...


Create New Folder

Name:
New PST folder

Folder contains:
Mail and Post Items

Select where to place the folder:
leslie.ross@nasa.gov
Archives
Ext. 1066 Voicemail
HQ-CAL-CTC
HQ-CAL-HQTraining
LAR Mail from 2007 thru 2012
Public Folders - leslie.ross@nasa.gov
Test

OK
Cancel

Move Data Methods

- Click your mouse on the item to be moved and hold your mouse as you move it to the new location. Release your mouse to drop the item in the new folder location (this method is referred to as “drag and drop”).

To select multiple items, press CONTROL as you click each item to be moved OR click on the first item to be moved and hold SHIFT as you click on the last item to select a group.

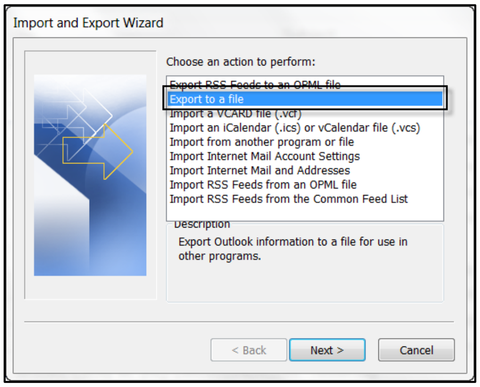
- Right-click the item and select **Move** from the shortcut menu. (This is the only way to move an e-mail message while it is open.) A list of most recently used folders displays. Select the desired folder if listed. If the desired folder is not listed, click **Other Folder**. The **Move Items** dialog box displays. Select the correct folder location in the **Move the selected items to the folder** list and then click **OK.**
- Create rules to move items automatically. (For more Information, documentation on Rules and Filters is available at http://nomadinternal.nasa.gov/nomad/documentation.html).

Backup .PST Files by Exporting

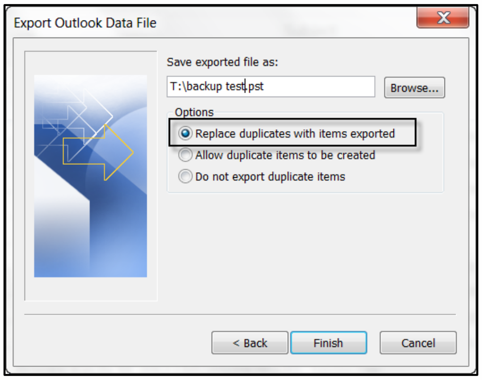
Once an Outlook item is moved to a **.pst** file, it is no longer backed up on the Outlook servers; it is, however, backed up by Autonomy ConnectedBackupPC. If you would like to import the **.pst** file to another Outlook client on a different machine, or use the Outlook contacts on another e-mail client or another computer, you need to backup the **.pst** file. Most importantly, considering that damaged or lost **.pst** files are not recoverable, it is strongly recommended that you also manually backup your **.pst** file on a regular basis. The length of time it takes for the backup to complete is dependent on the size of your **.pst** file and the frequency with which you backup.

Export .PST Files

1. Click **File** | **Open** | **Import**. The **Import and Export** wizard begins (shown right)
2. Select **Export to a file** and click **Next**. The **Export to a file** window displays prompting you to select the file type.
3. Select **Outlook Date File (.pst)**. Click **Next**. The **Export Outlook Data File** window displays prompting you to select the folder to export from.
4. Scroll to and select the **.pst** file and click the **Include Subfolders checkbox** if desired. Then click **Next**. The **Export Outlook Data File** window displays (shown right) prompting you to enter a file name and location.
5. Specify the location to save your **.pst** file backup. It is recommended that you save the **backup** .pst file to your **T:\drive.**
6. Select the option for handling duplicate items (shown right). As you will need to backup on a regular basis, it is recommend you overwrite the previous backup file. In order to ensure there are no duplicate items in the backup file, select “**Replace duplicates with items exported**” thereby only adding the changed or new items with each backup.
7. Click **Finish**. You will be prompted to password protect the backup .**pst**.
8. Select the desired password protection. As the recommended backup .pst file storage location is your **T:\drive** on the **server** (see step 5 above), a password is unnecessary. If you create a password and then forget the password, you will not be able to access the backup **.pst** file in the future.
9. Click **OK** to begin the export process.


Import and Export Wizard
Choose an action to perform:
Export RSS Feeds to an OPML file
Export to a file
Import a VCARD file (.vcf)
Import an iCalendar (.ics) or vCalendar file (.vcs)
Import from another program or file
Import Internet Mail Account Settings
Import Internet Mail and Addresses
Import RSS Feeds from an OPML file
Import RSS Feeds from the Common Feed List
Description
< Back
Next >
Cancel

Export Outlook information to a file for use in other programs.


Export Outlook Data File
Browse...
< Back
Finish
Cancel

Save exported file as:
T:\backup test.pst

Options
● Replace duplicates with items exported
○ Allow duplicate items to be created
○ Do not export duplicate items

While the export is running, you will not be able to do anything in Outlook until it completes.

Open .PST Backup Files

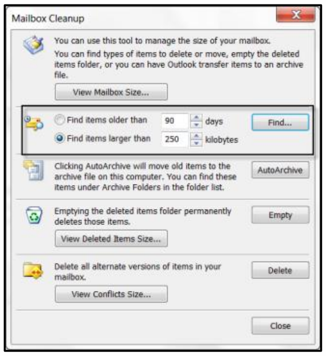
Opening a **.pst** backup file from the network file share (T:\drive) could corrupt the backup file and you could lose data in the **.pst** file. If you need to access the file, copy it to: C:\Users\YourUserName\Documents\Outlook Files.

1. Click **File** | **Open** | **Open Outlook Data File**. The **Open Outlook Data File** window displays.
2. Select the **.pst** backup file and click **Open**. The **.pst** backup file displays in the Outlook Navigation pane.

Search for Items to Delete or Move

Search Older/Larger Items

1. Click **File** | **Info** | **Cleanup Tools** | **Mailbox Cleanup**. The **Mailbox Cleanup** dialog box displays (shown right).
2. Select either **Find items older than ( ) days** or **Find items larger than ( ) kilobytes**.
3. Enter the value of days or kilobytes.
4. Click **Find**. The **Advanced Find** window displays with a search result (shown below in the section entitled "Work with Advanced Find Options").


Mailbox Cleanup
View Mailbox Size...
Find...
AutoArchive
Empty
View Deleted Items Size...
Delete
View Conflicts Size...
Close

You can use this tool to manage the size of your mailbox.

You can find types of items to delete or move, empty the deleted items folder, or you can have Outlook transfer items to an archive file.

○ Find items older than 90 days

● Find items larger than 250 kilobytes

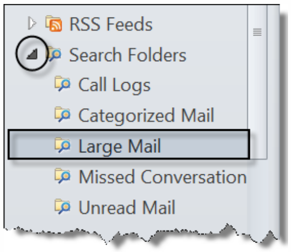
Clicking AutoArchive will move old items to the archive file on this computer. You can find these items under Archive Folders in the folder list.

Emptying the deleted items folder permanently deletes those items.

Delete all alternate versions of items in your mailbox.

Use Search Folders to find Large E-mail

1. From the Outlook Navigation pane, click the **triangle** beside **Search Folders** to expand the view. A number of **Outlook saved searches** display.
2. Click **Large Mail**. Outlook runs a saved search and displays mail throughout all your subfolders sorted and by size categories: **Enormous**, **Huge**, **Large** and **Very Large**.
3. Large messages can then be reviewed, deleted or moved to an **archive** or **.pst** file.

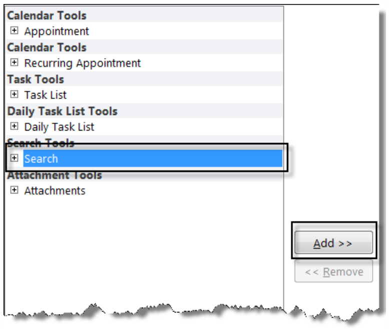

RSS Feeds
Search Folders
Call Logs
Categorized Mail
Large Mail
Missed Conversation
Unread Mail

Use Outlook Search Tools

Display the Search Tools Tab

The **Search Ribbon** is a **Tools Tab** that is contextual and displays whenever you run a search. You can enable the tab to display all the time.

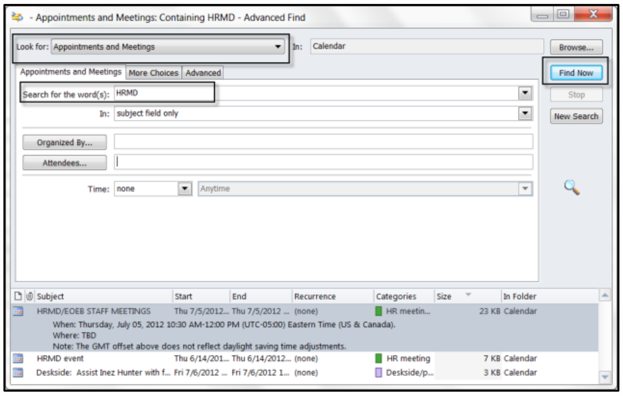
1. Click **File** | **Options** | **Customize Ribbon**.
2. In the **Choose commands from** drop-down list, select **Tool Tabs** | **Search Tools.**
3. In the **Customize the Ribbon** drop-down list, select **Main Tabs**.
4. Click **Add**. The **Search Tools** will display in the **Main Tabs** list to the right.
5. Enable the ribbon by clicking the **Search** checkbox. This will enable the **Search tab** to be available regardless of the context.
6. Click **OK** to dismiss the **Options** window.


Calendar Tools
Appointment
Calendar Tools
Recurring Appointment
Task Tools
Task List
Daily Task List Tools
Daily Task List
Search Tools
Search
Attachment Tools
Attachments
Add >>
<< Remove

Work with Advanced Find Options

1. Click **Search** | **Search Tools** | **Advanced Find**. You can also use the shortcut keystroke **CONTROL + SHIFT + F**. The **Advanced Find** window displays (shown right).
2. Select the type of item you are looking for in the **Look for** field drop-down list. You can look for **Appointments and Meetings**, **Contacts**, **Messages**, **Notes**, or **any type of Outlook item**.
3. Click **Browse** to select the folders to include in your search. The **Select Folders** dialog box displays.

You can search your mailbox, Archive or .pst files if they are open in your Outlook Navigation pane. However, you can only select folders from one data file at a time.


- Appointments and Meetings: Containing HRMD - Advanced Find
Appointments and Meetings
More Choices
Advanced
Browse...
Find Now
Stop
New Search
Organized By...
Attendees...

Look for: Appointments and Meetings

In: Calendar

Search for the word(s): HRMD

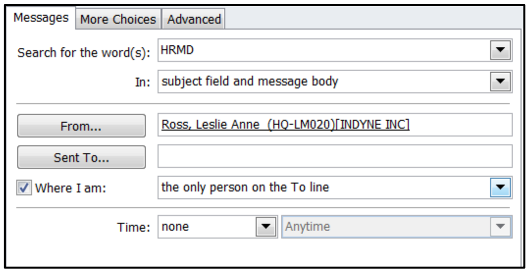
In: subject field only

Time: none Anytime

Subject	Start	End	Recurrence	Categories	Size	In Folder
HRMD/EOEB STAFF MEETINGS	Thu 7/5/2012...	Thu 7/5/2012 ...	(none)	HR meetin...	23 KB	Calendar
When: Thursday, July 05, 2012 10:30 AM-12:00 PM (UTC-05:00) Eastern Time (US & Canada). Where: TBD Note: The GMT offset above does not reflect daylight saving time adjustments.						
HRMD event	Thu 6/14/201...	Thu 6/14/2012...	(none)	HR meeting	7 KB	Calendar
Deskside: Assist Inez Hunter with f...	Fri 7/6/2012 ...	Fri 7/6/2012 1...	(none)	Deskside/p...	3 KB	Calendar

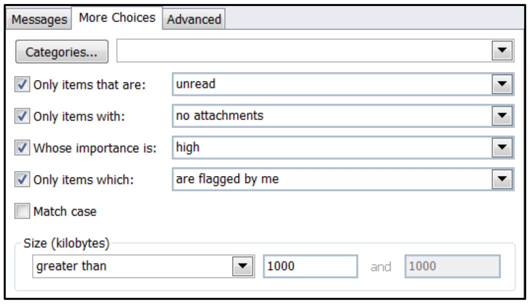
4. Click the **Search subfolders checkbox** to search within a group of nested folders. Otherwise, click to select the checkbox for each folder separately.
5. Click **OK**. The **Advanced Find** window displays again with the **In** field displaying the selected search folders.

6. On the **Messages** tab (shown right), enter your search criteria:
    (a) In the **Search for the word(s)** field, type the search keyword(s).
    (b) In the **In** field, select **subject field only** or **subject field and message body**.
    (c) Click **From** to select the sender from either the Outlook address book or your personal contacts. You can select multiple people.
    (d) Click **Sent To** to select the recipient from either the Outlook address book or your personal contacts. You can select multiple people.
    (e) Click the **Where I am** checkbox to enable the field, and click the drop-down arrow to select **the only person on the To line**, **on the To line with other people**, or **on the CC line with other people**.
    (f) Click the **Time** drop-down arrow to select from the list provided. Options include the **time received**, **sent**, **due**, **expires**, **created** or **modified**.
    (g) Once a time criteria has been designated, click the drop-down arrow in the next field to select from the list provided. Options include **Anytime, Yesterday, Today, In the last 7 days, Last/This week,** or **Last/this Month.**



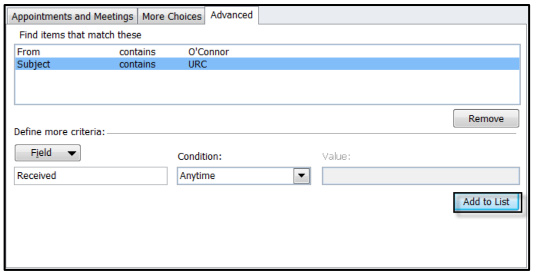
Search for the word(s): HRMD
In: subject field and message body
From... Ross, Leslie Anne (HQ-LM020)[INDYNE INC]
Sent To...
☑ Where I am: the only person on the To line
Time: none Anytime

7. On the **More Choices** tab (shown right), click **Categories** to select a category to search by or enable one of the following conditions as appropriate:
    (a) only items that are either **read** or **unread**.
    (b) only items with either **one or more attachment**, or **no attachments**.
    (c) where importance is either **normal**, **high** or **low**.
    (d) only items which **are marked completed**, **are flagged by someone else**, **have no flag** or **are flagged by me**.
    (e) In the **Size** section, select from the options provided and then enter the size limitations in the two size fields.



☑ Only items that are: unread
☑ Only items with: no attachments
☑ Whose importance is: high
☑ Only items which: are flagged by me
☐ Match case
Size (kilobytes)
greater than 1000 and 1000

8. On the **Advanced** tab (shown right), create a conditional search using multiple search criteria as follows:
    (a) Click the **Field** drop-down and select the field **type** and **specific field** to search within.
    (b) In the **Condition** field, select the conditional search **operator**. Options includes **contains**, **is (exactly)**, **doesn't contain**, **is empty**, and **is not empty**.
    (c) In the **Value** field, enter the text to be searched.
    (d) Click **Add to List** to add the search criteria into the list box.
    (e) Follow the steps above to continue to create conditional search criteria as appropriate.
    (f) Click **Remove** to delete conditional search criteria.
9. Click **Find Now** to run the search.



Find items that match these
From contains O'Connor
Subject contains URC
Define more criteria:
Received
Condition: Anytime
Value:

Once the search completes, the Advanced Find dialog box displays all messages that meet the search criteria. From the list box, right-click on a message to display a shortcut menu with options to Quick Print, Reply, Reply All, Forward, Categorize, Move, Delete or Secure.

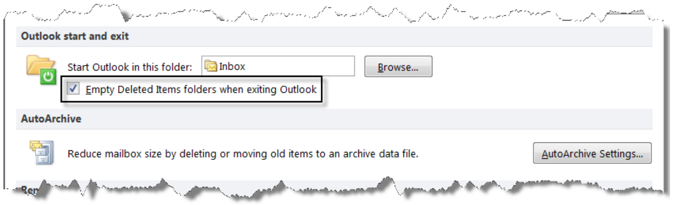
Work with Deleted Items Tools

1. To determine the size of your **Deleted Items** folder, right-click **Deleted Items** in the Navigation pane, and click **Properties** | **Folder Size** | **Server Data** tab. The total size of your **Deleted Items** will display.
2. To **Empty Deleted Items**, right-click on **Deleted Items** in the Navigation pane and click **Empty Folder**. You will be prompted to permanently delete all items and subfolders from the **Delete Items** folder.
3. Click **Yes**.

*You can also permanently delete items by pressing **SHIFT + DELETE** and Outlook will permanently delete the item without placing it in the Deleted Items folder at all.*

Automatically Empty Deleted Items

1. Click **File** | **Options** | **Advanced**. The **Outlook Advanced Setting** options display.
2. In the **Outlook start and exit** section (shown right), select **Empty Deleted Items folders when exiting Outlook**.



Outlook start and exit

Start Outlook in this folder: Inbox

☑ Empty Deleted Items folders when exiting Outlook

AutoArchive

Reduce mailbox size by deleting or moving old items to an archive data file.

Access the Recoverable Items

If you delete an item and need to restore it to your mailbox, it is available in the **Recover Deleted Items** list.

The Recoverable Items are stored for a period of two weeks after the deletion date.

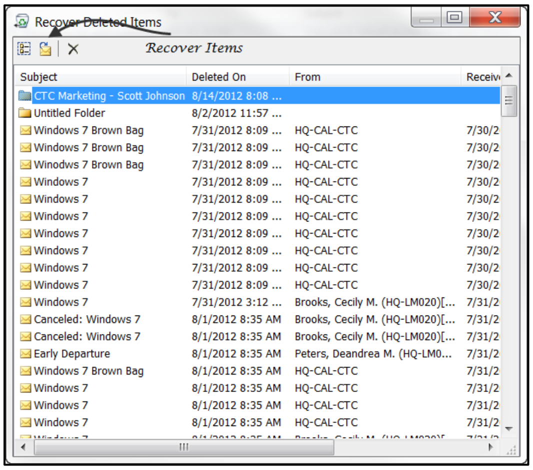
Display the Recover Deleted Items Folder

1. Display the **Deleted** Items folder.
2. Click **Folder** | **Recover Deleted Items**. The **Recover Deleted Items** window displays (shown right).
3. Select items to be recovered. Multi-select by pressing **SHIFT + click** for contiguous items or **CONTROL + click** for non-contiguous items.

*You can also click the **Select All** ico.*

4. Click **Recover Selected Items** to restore the messages to your **Deleted Items** folder.

Clicking Delete ☒ in the Recover Deleted Items Folder will permanently delete the item from the Outlook server.



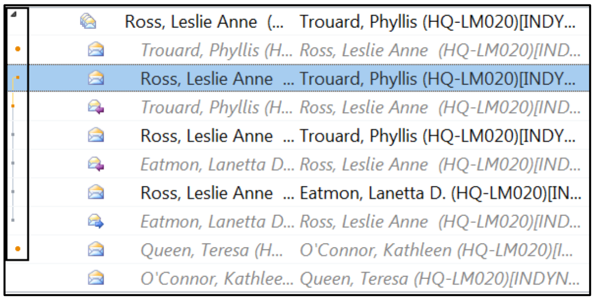
Subject	Deleted On	From	Receiv
CTC Marketing - Scott Johnson	8/14/2012 8:08 ...		
Untitled Folder	8/2/2012 11:57 ...		
Windows 7 Brown Bag	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7 Brown Bag	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Winodws 7 Brown Bag	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7	7/31/2012 8:09 ...	HQ-CAL-CTC	7/30/2
Windows 7	7/31/2012 3:12 ...	Brooks, Cecily M. (HQ-LM020)[...	7/31/2
Canceled: Windows 7	8/1/2012 8:35 AM	Brooks, Cecily M. (HQ-LM020)[...	7/31/2
Canceled: Windows 7	8/1/2012 8:35 AM	Brooks, Cecily M. (HQ-LM020)[...	7/31/2
Early Departure	8/1/2012 8:35 AM	Peters, Deandrea M. (HQ-LM0...	7/31/2
Windows 7 Brown Bag	8/1/2012 8:35 AM	HQ-CAL-CTC	7/31/2
Windows 7	8/1/2012 8:35 AM	HQ-CAL-CTC	7/31/2
Windows 7	8/1/2012 8:35 AM	HQ-CAL-CTC	7/31/2
Windows 7	8/1/2012 8:35 AM	HQ-CAL-CTC	7/31/2

Use Outlook 2010 Clean Up Tools

A conversation or e-mail thread is a chain of e-mail messages with the same subject. Any messages that are duplicated within a later message are considered redundant. **Conversation Clean Up** evaluates each message in a conversation or message thread. Any messages duplicated within a later message are moved to the **Deleted Items** folder. This clean up can be performed on your inbox, a specific mail folder alone or a folder with its subfolders.

View E-mail Conversations

1. Display the folder containing the conversation to be cleaned up.
2. Click **View** | **Show as Conversations**. You will be prompted to apply the view to all folders or this individual folder.
3. Select the appropriate action. The folder(s) display with **triangle** icons beside the most recent message and all previous messages are grouped below it.



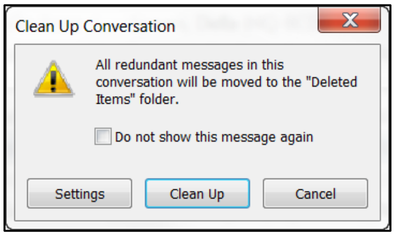
Ross, Leslie Anne (...	Trouard, Phyllis (HQ-LM020)[INDY...
Trouard, Phyllis (H...	*Ross, Leslie Anne (HQ-LM020)[IND...*
Ross, Leslie Anne ...	Trouard, Phyllis (HQ-LM020)[INDY...
Trouard, Phyllis (H...	*Ross, Leslie Anne (HQ-LM020)[IND...*
Ross, Leslie Anne ...	Trouard, Phyllis (HQ-LM020)[INDY...
Eatmon, Lanetta D...	*Ross, Leslie Anne (HQ-LM020)[IND...*
Ross, Leslie Anne ...	Eatmon, Lanetta D. (HQ-LM020)[IN...
Eatmon, Lanetta D...	*Ross, Leslie Anne (HQ-LM020)[IND...*
Queen, Teresa (H...	*O'Connor, Kathleen (HQ-LM020)[I...*
O'Connor, Kathlee...	*Queen, Teresa (HQ-LM020)[INDYN...*

Clean Up by Conversation

1. Highlight the latest message in a conversation.
2. Click **Home** | **Clean Up** drop-down arrow | **Clean Up Conversation**.
   Or Right-click on the message and select **Clean Up Conversation**. The **Clean Up Conversation** dialog box displays (shown right).

You can access the Clean Up options by clicking Settings.

3. Click **Clean Up**. You will be prompted that all redundant messages in this conversation will be moved to the **Deleted Items** folder.
4. Click **OK**. Any messages that are duplicated within a later message will be deleted.



Clean Up Conversation

All redundant messages in this conversation will be moved to the "Deleted Items" folder.

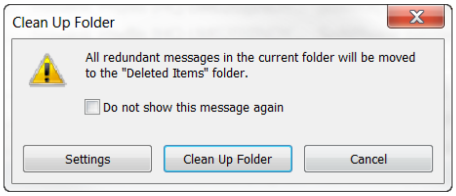
☐ Do not show this message again

Clean Up by Folder

1. Click **Home** | **Clean Up** drop-down arrow | **Clean Up Folder** or **Clean Up Folder and its Subfolders**. The **Clean Up Folder** dialog box displays.

You can access the Clean Up options by clicking Settings.

2. Click **Clean Up Folder**. You will be prompted that the action will be applied to the specific folder or to the folder and its subfolders.
3. Click **OK**. Any messages that are duplicated within a later message will be deleted.

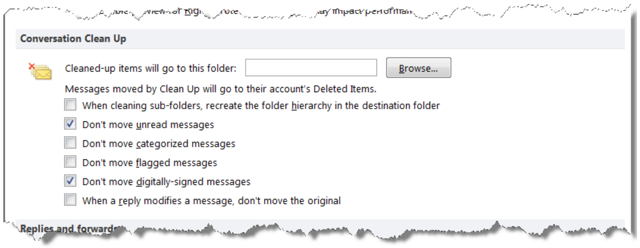


All redundant messages in the current folder will be moved to the "Deleted Items" folder.

☐ Do not show this message again

The Conversation Clean Up Options

1. To access the options, click **Settings** on the **Clean Up** dialog box. OR click **File | Options | Mail**.
2. Scroll down to the **Conversation Clean Up** option settings.
3. Make your setting selections and click **OK.**



Cleaned-up items will go to this folder:

Messages moved by Clean Up will go to their account's Deleted Items.

☐ When cleaning sub-folders, recreate the folder hierarchy in the destination folder
☑ Don't move unread messages
☐ Don't move categorized messages
☐ Don't move flagged messages
☑ Don't move digitally-signed messages
☐ When a reply modifies a message, don't move the original

Work with Archives

An Archive file is a type of Outlook Data File (**.pst**). The first time the AutoArchive runs, the Archive file is automatically created.

Archived Folders are not accessible through Webmail or SNA.

If you choose to have items deleted, they are not archived. If you choose to have items archived, they cannot be deleted by an AutoArchive. Once items are archived, they can only be deleted manually.

Create Archive File through File Options

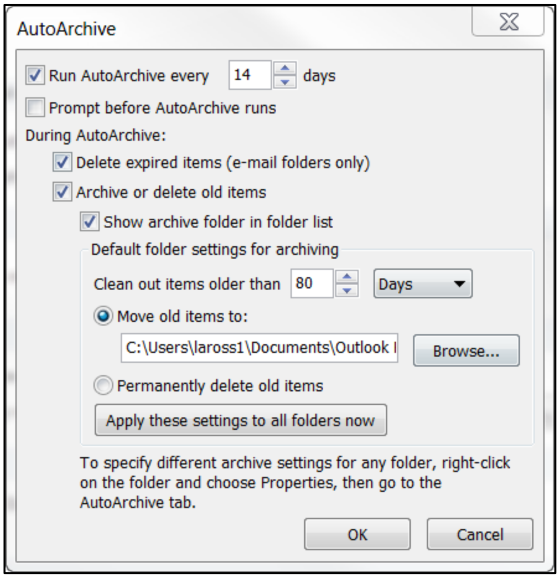
1. Click **File** | **Options** | **Advanced** | **AutoArchive Settings**. The **AutoArchive** dialog box displays.
2. Define the **settings**.
3. Select the checkbox for "**Run AutoArchive every [enter value] days**." Once selected the other options become available.
4. Choose how often AutoArchive runs. Archiving many items at the same time might slow your computer's performance. Therefore, it is better to use archive more frequently to reduce the number of items processed.

It is highly recommended to set the interval to 14 days.

5. Click "**Apply these settings to all folders now**" to run AutoArchive process immediately for all folders in your mailbox.

If you want to set up unique archive options at the folder level do not click this button.

6. Click **OK** to dismiss the **AutoArchive** dialog box and then click **OK** to dismiss the **Outlook Options** window. The AutoArchive process will run based on your selected settings.



☑ Run AutoArchive every 14 days
☐ Prompt before AutoArchive runs
During AutoArchive:
☑ Delete expired items (e-mail folders only)
☑ Archive or delete old items
☑ Show archive folder in folder list
Default folder settings for archiving
Clean out items older than 80 Days
● Move old items to:
C:\Users\laross1\Documents\Outlook I
○ Permanently delete old items

To specify different archive settings for any folder, right-click on the folder and choose Properties, then go to the AutoArchive tab.

You can also set up these settings by folder. Simply right-click on the appropriate folder in the Outlook Navigation pane, and click the AutoArchive tab. The same settings will be available.

Official NOMAD training materials and documentation are available at:

http://nomad.nasa.gov/nomad/documentation.html

Help Desk and Center Outreach contact information is available at:

http://nomad.nasa.gov/nomad/nomadoutreach.html

For software training, contact the Computer Training Center (CTC) at 358-1111
or visit the CTC Web site at http://itcd.hq.nasa.gov/ctc.